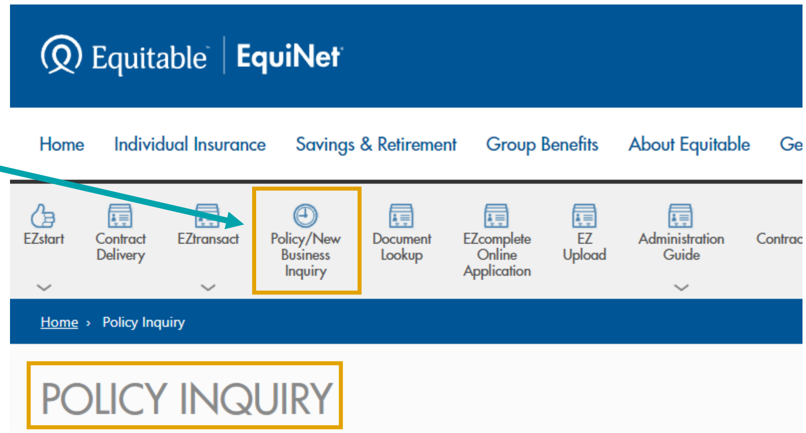
Equitable™

Completing a Universal Life re-allocation or transfer of investments on EquiNet®

Quick Guide:

1. **Login** into EquiNet.
2. Click **Policy Inquiry.**



3. Enter the **policy number**, click **search**, then select the policy.
4. Click on the **Investments tab**.
5. Select **Account Value Transfer** or **Change Allocations** to start the transaction.
   - Follow the detailed steps on the left to complete your transaction(s).
6. **Review** your entries carefully before clicking **submit.**
7. We will send an email to you and the client as **confirmation.**
8. Clients will receive the document via secure email for **electronic signature.**
9. Once all required signature(s) have been received, the request will automatically be sent to **our Life Admin** team for processing.

Tips:

- For both Transfers and Deposit Allocation changes, a PDF record of the digital transaction will show in the **Documents tab** on EquiNet and **Client Access**.
- **Keep a record of the security code for each transaction as you are requesting it**. You will need to provide it to the signer(s) in order to complete the signature(s) step.

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